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RV BUSINESS

JUNE 25, 1990

Major Firms See Sales Recovery

After spending much of 1989 fighting a downward trend in sales, spokesmen for several major manufacturers are saying that 1990 spring sales, while far from robust, marked a turn for the better. Prospects now are for improved growth this summer, leading into a strong 1991, they agreed.

"We are upbeat about the May-through-July quarter," announced J. Patrick Kerich, chairman and chief executive officer of Mallard Coach Co., Nappanee, Ind. "We think our motorized shipments will be up at least 10% compared with the same period of 1989."

Kerich said he based that optimism on February-through-April sales, which started weak and finished relatively strong. In contrast, the February-through-April period of 1989 started strong and finished weak, he noted.

Similarly upbeat, Gulf Stream Coach Inc., Nappanee, Ind., experienced a dramatic increase in sales despite the soft market earlier this year, according to Kip Wellin, national sales manager. Gulf Stream travel-trailer and fifth-wheel shipments increased 68% in January and February compared with the first two months of last year, while industrywide travel-trailer shipments increased only 2%, and nationwide fifth-wheel shipments were up 4% over the first two months of '89. Also, Gulf Stream's Class C motorhome shipments increased 31% in January and February, while Class C shipments industrywide declined over 20% compared with last year's tally.

"Our growth comes from

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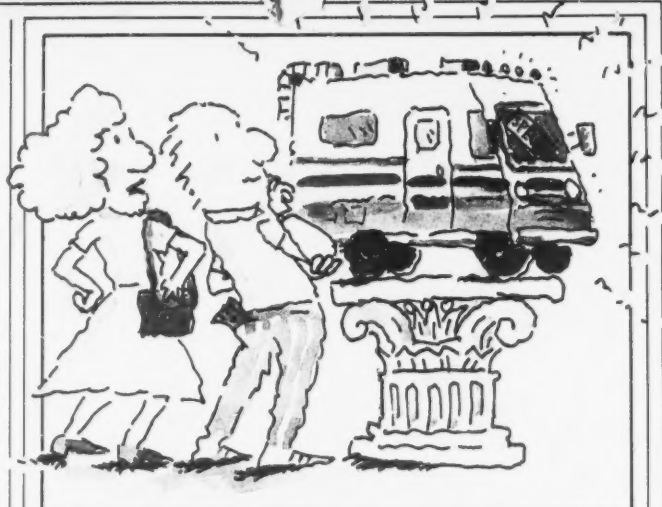

CONSUMER VIEWPOINTS: With 1990 off to a slow start and wary consumers bargaining hard, RVB decided to take the pulse of the market with an informal survey of RV shoppers in four key markets.

Funding Snag Threatens Opening Of RVIA Tech School in Indiana

RVIA's National RV Technical Institute (NRVTI) has hit a funding roadblock at its Elkhart, Ind., pilot site—a roadblock large enough to threaten the scheduled fall opening of the school in the nation's RV-manufacturing heartland.

An angry Bill Reiber, RVIA director of education in charge of developing the NRVTI program, explained that RVIA chose to locate one of its pilot instructional sites at Elkhart's Indiana Vocational Technical College-North-central (Ivy Tech) because it assumed that state funds would provide for a full-time instructor and renovation of space into a classroom/shop area.

Now it looks as if that funding may not be forthcoming. At the local NRVTI advisory board's May 10 meeting, members were informed by Ivy Tech regional Vice President-Chancellor Carl Lutz that he can provide less than half the funds needed for a $30,000-a-year instructor and classroom renovation. Lutz's regional budget covers five state vocational schools, including Elkhart's Ivy Tech.

Lutz explained that money for a full-time instructor will not be available until 1991, since the RV-mechanic curriculum for a two-year associate-degree program must first be approved by the state Commission for Higher Education to qualify for funding. Lutz also said that although he can request funding from Ivy Tech officials in Indianapolis, Ind., for the needed classroom renovation, he cannot guarantee that money will be approved.

Lutz did offer temporary classroom space at Ivy Tech. But, because of the technical school's program format, Reiber and other RV officials remained adamant that Ivy Tech should pay for an instructor, do some promotion of the program and provide a permanent instruction space.

Reiber said RVIA would pull its support for the school in Elkhart if local RV builders are

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RV BUSINESS

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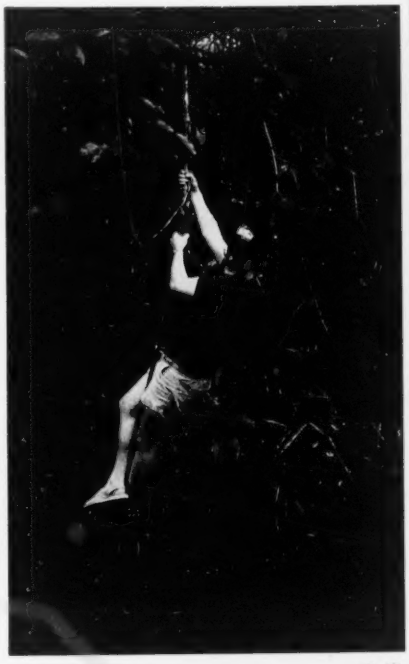

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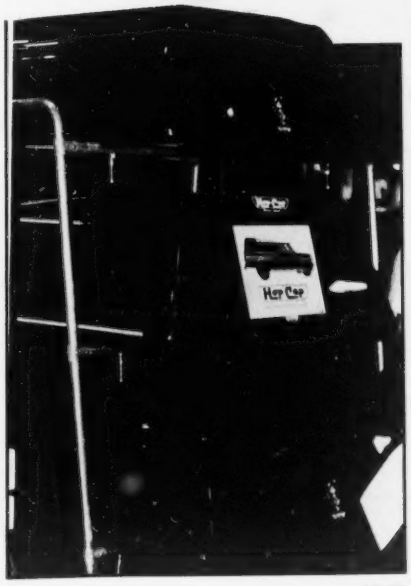

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Truck Caps Seek Top Image ____ 25

Truck-cap manufacturers, suppliers and dealers are joining in a new association to increase their market penetration and industry professionalism, as exemplified by the unexpectedly high attendance at the first national truck-cap trade show this year.

Consumer Viewpoints ____ 33

With the 1990 market off to a slow start and RV consumers bargaining harder than ever, every bit of intelligence about buying attitudes comes in handy. So, RVB conducted an informal survey of RV shoppers in four key market areas.

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MARKETING

Survey Shows Reps' Product Picks Stress Salability, Reputation

The majority of independent representatives choose product lines based on their salability, the reputation of the company, the commission arrangement and a line's compatibility with other lines, according to a copyrighted survey, "How to Get and Keep Good Product Lines," by Lavin Associates, Cheshire, Conn.

Representatives are less concerned with whether lines are competitive, or whether they get a fair contract. A manufacturer's good credit rating, good business philosophy, or effective sales aids also got lower marks than factors like product salability from the 51 independent representatives who replied to Lavin's survey.

The companies who responded averaged 5.9 employees, represented an average of 11.7 product lines and had been in business an average of 24.3 years. Sixty percent were electric/electronic representatives, and the remainder were from assorted industries. Δ

HOW DO SALES REPS WEIGH FACTORS IN EVALUATING A PROSPECTIVE PRODUCT LINE?

Factors	Very Important	Important	Not Important
Marketable (Will it sell?)	84.0%	15.7%	–
Ethical (Good reputation)	76.5%	19.6%	4.0%
Equitable (Fair commissions)	64.7%	35.5%	–
Compatible (Fits with present lines)	56.0%	41.2%	20%
Competitive (In pricing, delivery, service)	41.2%	58.8%	–
Protective (Fair contract)	39.2%	60.8%	–
Profitable (Good credit rating)	35.3%	62.7%	2.0%
Progressive (Good business philosophy)	33.3%	60.8%	6.1%
Supportive (Effective selling aide)	33.3%	62.7%	4.0%

MANUFACTURERS

President, Two Top Execs Quit Mallard Coach

The May 1 resignation of Mallard Coach Co. Inc. President Ron Cleland brought to three the number of upper-level executives to have recently announced their departures from Mallard, the nation's No. 4 producer of motorhomes and No. 6 manufacturer of towables.

However, J. Patrick Kerich, the former Skyline Corp. executive who assumed the chairmanship of Mallard last October, told *RV Business* that the resignations of Cleland, 43; Ron Dickeson, 43, formerly vice president and general manager; and A.J. Paul, 47, former chief financial officer, were not indicative of any major "changing of the guard" at the Nappanee, Ind.-based RV maker.

"That really isn't the case because we have a strong core of experienced, committed people who are dedicated to moving Mallard successfully into the future," Kerich said. "Ron Cleland retired after many good years with the company. It was his decision, made after considerable deliberation. According to Ron, it's been on his mind for a number of years."

Kerich added there were no immediate plans to fill Cleland's slot. "We're not going to make any moves. Jack Nicholson is our executive vice president, and he will continue in that role and will be responsible for operations. And I will continue in my role as CEO, chairman and treasurer," he said.

Cleland, who was unavailable for comment, had been with Mallard since 1982 and had played a pivotal role in Mallard's rapid emergence as a publicly held Indiana company with annual sales exceeding $190 million. Cleland reportedly plans an extended vacation before his next career move.

Prior to Cleland's departure, Dickeson had left to become vice president of sales and marketing for Damon Corp., Elkhart, Ind., and Paul had resigned to pursue "local business interests," according to Kerich. While Dickeson's position has not been filled, Kerich said Paul has been replaced by Gerald K. Pilmore, 45, who was most recently chief financial officer for Mutual Savings Bank, Bay City, Mich., and is a former board chairman of Elkhart's Banc One. Δ – *Sherman Goldenberg*

FLEETWOOD *from page 9*

to lower-priced products," Marriner said, "which we introduced at the Louisville show last December. And these products have been very well-received, as have our previously introduced Flair Class A motorhome and recently redesigned Bounder motorhome. . . That is what I think has carried us through the fourth quarter. In addition, a fairly strong manufactured-housing industry has played a role."

Robert Curran, an analyst with New York-based Merrill Lynch Capital Markets, said there was no single reason for Fleetwood's continued strength. Popular new products, acceptable refinements to existing products and a "full-coverage" dealer network all had an effect, Currin pointed out.

"There are some companies having problems of one sort or another, and that creates opportunity for other companies," Currin added. "And I think Fleetwood was one of the companies that has capitalized on that, although I don't think their success has simply been at the expense of companies that have problems." Δ – *Sherman Goldenberg*

MARKETING

Report Details Auto Aftermarket Distribution Channels

A recently published fourth edition of *The Retail Distribution of Automotive Products* reveals that although the past 10 years has seen a high rate of merger and acquisition activity in the automotive-retail industry, the total number of outlets handling automotive products has not changed significantly.

Commenting on the relative stability of auto-product outlets (see figure), Donald A. Droesch, vice chairman of the Foundation for Aftermarket Industry Research (FAIR), which conducted the aftermarket research, said, "The significant changes that we found have been in the distribution channels" to those retail outlets.

FAIR was established in 1980 by the Automotive Parts & Accessories Association (APAA) to conduct professional and scientific research and surveys on products in the automotive aftermarket. Based in Maryland, just outside of Washington, D.C., APAA has 2,000 members and serves as a primary resource for the automotive-aftermarket industry. Droesch also heads the APAA's market-research committee.

The new edition contains more detail than previous reports, including the number of chain vs. independent outlets in all categories and, for the first time, counts of quick-lube shops and convenience stores. Data from all four editions of the study also have been compiled and charted in easy-to-use, 10-year trend tables and graphs.

The cost of the 286-page aftermarket guide is considered a tax-deductible contribution to FAIR, added Droesch. The cost to APAA members is $1,450; for nonmembers, it is $1,650. The study is available from APAA, 5100 Forbes Blvd., Lanham, Md. 20706. Δ

NUMBER OF ESTABLISHMENTS HANDLING AUTOMOTIVE PRODUCTS
(in thousands)

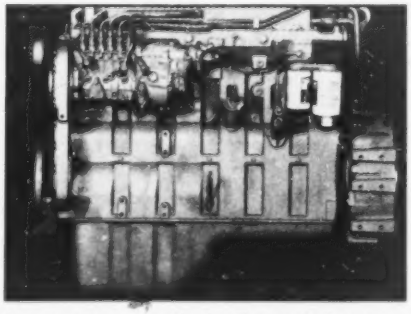
Type of Outlet	1980	1983	1986	1989
Traditional	65.6	71.5	71.9	69.9
Service	317.6	313.1	290.7	294.3
Mass Market	130.3	133.1	140.6	148.5
TOTAL OUTLETS	521.7	518.7	507.3	523.8

Traditional Outlet = Auto supply / Tire / Jobber
Service Outlet = Car dealer / Service station / Specialty repair / General repair
Mass Market = Discount / Department / Hardware / Food / Drug / Variety

DIESEL ENGINE *from page 7*

use engines like Detroit Diesel's 8.2-liter, Caterpillar Engine's 3298T and Cummins' 6CTA 8.3-liter.

In order to meet the new standards, Detroit Diesel, which has begun supplying some 8.2-liter diesel engines to Winnebago Industries Inc., Forest City, Iowa, plans to phase out that engine by the end of this year and replace it with a new 210-horsepower, six-cylinder engine produced by



New emissions standards affect motorhome engines like the Cummins 6CTA 8.3 liter.

Perkins Engines, a division of Varity Corp., Toronto, Ontario, Canada. Detroit Diesel will sell and service the Perkins engine under its own name, according to a company official.

Other manufacturers, like Cummins Engine, Columbus, Ind., and Caterpillar Inc., Peoria, Ill., are using more sophisticated electronic controls to enable their engines to meet the 1991 standards. As a result, prices of their engines also are expected to increase by more than $500, say several analysts.

Overall, the price hikes likely will mean a setback for the small but growing popularity of diesels in the RV market. However, as one analyst pointed out, the standards affect only diesel engines produced after Jan. 1, 1991, so that vehicle manufacturers can stockpile some engines built this year and install them in pickups and motorhomes produced after January to provide a short-term hedge against the higher prices. Δ—*Craig Polisky*

RECOVERY *from cover*

signing up new dealers and strong retail sales for Class C's," Wellin said. "We have some dealer incentive programs that helped, but we made up for that with higher volume."

Still, Wellin did not assume that this year would be easygoing for RV makers, characterizing this spring's towable market as only "fair," the Class A market as "tough," and the Class C market as "fair-to-good."

The largest company in the industry, Fleetwood Enterprises Inc., Riverside, Calif., sounded a similar note of cautious optimism. Although Fleetwood reported a sales decline during the February-through-April period compared with its record-setting sales in the spring of 1989, officials look forward to improvement this quarter and in 1991.

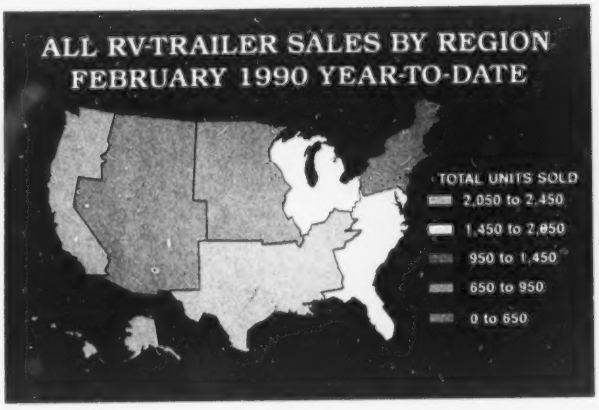
"We will do better in the May-through-July quarter than we did in the February-through-April quarter," said Elden L. Smith, senior vice president of Fleetwood's Recreational Vehicle Group. "We feel fairly comfortable. Our reading of the industry in 1990 is that both towables and motorized will be off by equal amounts (because wholesale deliveries of towables slowed after February)," Smith said. "I think 1991 will then be stronger than 1990."

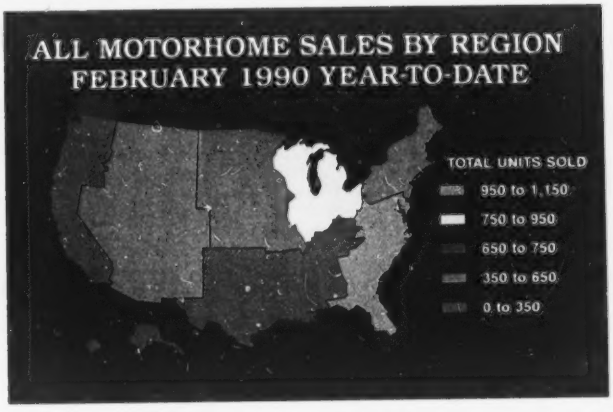
Meanwhile, Phillip G. Lux, president and chief operating officer of Coachmen Industries Inc., Elkhart, Ind., predicted during Coachmen's annual shareholders' meeting in May that "the market won't improve much in the next six months. The consumer is less confident in the economy than a year ago."

However, Lux joined other major manufacturers in predicting continued improvement into 1991. "We probably will have a sluggish 1990 selling season, with a gradual turnaround heading into a significantly stronger 1991," he forecast. "Wholesale shipments should follow retail for the remainder of 1990, and when the market turns, there will be a lot of pipeline-filling." Δ—*Jeff Kurowski*

FEBRUARY FINDS TRAILERS UP, MOTORHOMES DOWN

THOMAS WALWORTH





East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin; **Mountain**: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming; **Northeast**: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont; **Pacific**: Alaska, California, Oregon, Washington, Hawaii; **South Atlantic**: Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia; **West North Central**: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota; **South Central**: Texas, Oklahoma, Arkansas, Louisiana, Tennessee, Mississippi, Alabama.

By the end of February, the RV-trailer market was up 1.04% in retail sales compared with the first two months of 1989, while the motorhome market was down 9.2% for the year-to-date. However, it must be noted that 1990 retail-sales numbers are no longer available from the state of California, so all comparisons are based on figures from which California data has been deleted.

RV-trailer sales for February were up by 537 units, or 10.1%, over February 1989. Figure 1 shows the regional rankings based on the percent of change in trailer sales in February 1990 compared with February 1989. The South Central region topped the rankings, and, within that region, Alabama reported the largest percentage gain. The South Atlantic region came in last place, and Maryland experienced the largest decline among the states in the region.

For the year-to-date, RV-trailer sales were up by 100 units, or 1.04%, in February compared with the same two-month period of 1989. Figure 2 lists the seven national regions by their year-to-date percentage change in trailer sales compared with the first two months of 1989. In the top-ranked South Central region, Alabama had the largest gain. The West North Central region trailed the pack, with North Dakota recording the largest percent decline.

Meanwhile, the motorhome market declined by 392 units, or 12.8%, in February compared with the same month last year. Figure 3 is a regional ranking by percent of change in motorhome sales for February 1990 compared with February 1989. The Pacific region held the No. 1 spot in percent gain in motorhome sales for February, and Washington state reported the largest increase in the region. In the bottom-ranked Northeast region, Maine had the largest percentage decline for the month.

For the year-to-date, the motorhome-sales figure fell by 491 units, or 9.2%, com-

RV TRAILERS, FEB. '90

Feb. '90 Rank	Region	% of Change From Feb. '89	Jan. '90 Rank
1	S. Central	51.7	1
2	Pacific	43.5	3
3	W.N. Central	15.3	6
4	Mountain	8.0	4
5	E.N. Central	4.9	7
6	Northeast	.3	5
7	S. Atlantic	–15.2	2

Figure 1

RV TRAILERS, YEAR-TO-DATE

Feb. '90 Rank	Region	% of Change Year-to-Date	Jan. '90 Rank
1	S. Central	32.0	1
2	Pacific	19.8	3
3	Mountain	– 4.8	4
4	S. Atlantic	– 7.0	2
5	Northeast	– 8.0	5
6	E.N. Central	– 9.2	7
7	W.N. Central	–13.0	6

Figure 2

MOTORHOMES, FEB. '90

Feb. '90 Rank	Region	% of Change From Feb. '89	Jan. '90 Rank
1	Pacific	17.2	4
2	S. Central	– 7.3	2
3	E.N. Central	–11.3	7
4	W.N. Central	–13.0	5
5	Mountain	–18.2	3
6	S. Atlantic	–20.4	1
7	Northeast	–25.0	6

Figure 3

MOTORHOMES, YEAR-TO-DATE

Feb. '90 Rank	Region	% of Change Year-to-Date	Jan. '90 Rank
1	Pacific	19.1	4
2	S. Central	– .1	2
3	S. Atlantic	– 6.4	1
4	Mountain	– 8.8	3
5	W.N. Central	–10.6	5
6	E.N. Central	–22.8	7
7	Northeast	–25.3	6

Figure 4

GRAPHICS: CUSTOM COLOR VISUALS

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AT RETAIL *continued*

pared with the first two months of 1989. Figure 4 details the regional rankings based on the percentage change in motorhome sales during the first two months of 1990 compared with January and February of 1989. The Pacific region led the pack, with Washington state reporting the largest percentage increase. In the last-place Northeast, Maine experienced the largest decline for the year-to-date.

The RV-trailer market was off to a good start for 1990.

Overall, the RV-trailer market was off to a good start for 1990, but the motorhome market was slower off the mark. If the data-availability problems in California are solved, we will be able to give a more complete analysis of the market. Δ

Thomas Walworth is general manager of Statistical Surveys Inc., Grand Rapids, Mich., which has reported retail statistics for 30 years to the RV industry. Statistical Surveys is an acknowledged leader in the RV statistical field.

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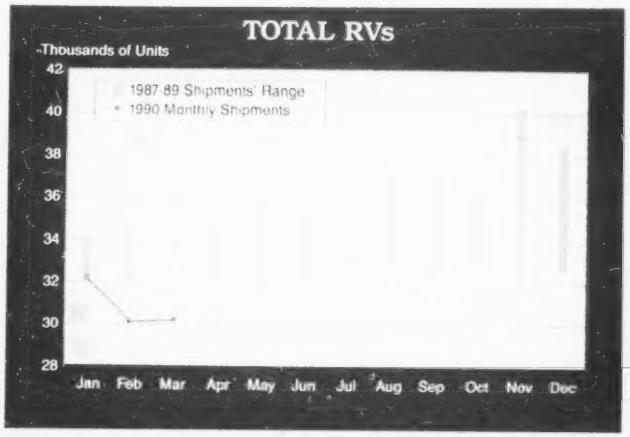
MARCH SHIPMENTS HAVE A SPRING IN THEIR STEP

MORTON J. MARCUS



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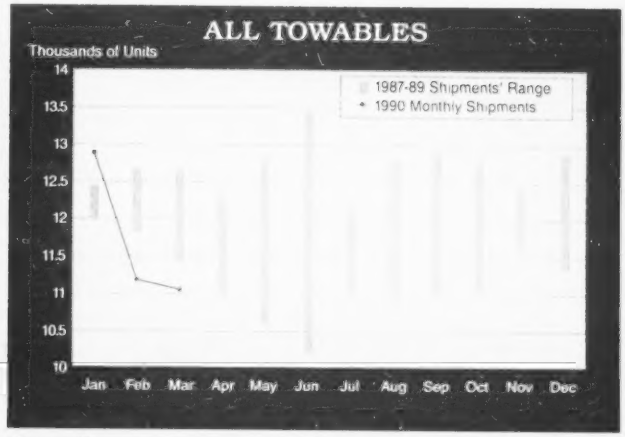

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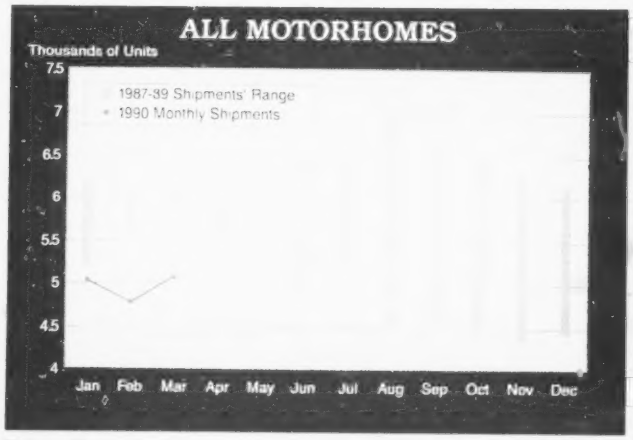

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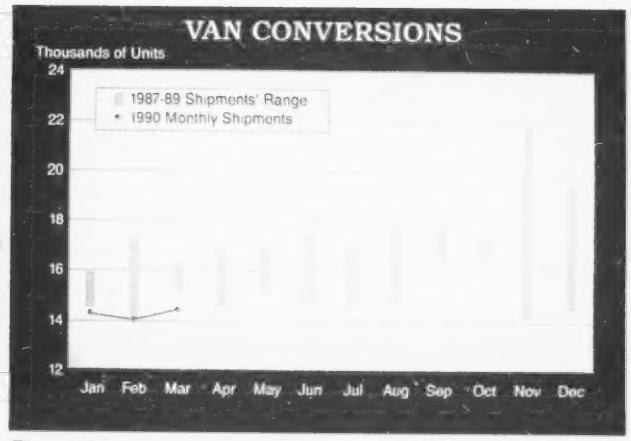

Figure 4

The downward slide of the past few months was arrested in March. Total shipments, for the first time since last November, gave evidence of a slight upward tendency.

GRAPHICS: CUSTOM COLOR VISUALS

Spring is a season of regeneration and growth, a time when the first tentative buds emerge and baseball memories are revived. March shipment data from RVIA were part of that upbeat mood.

The hopeful spring message is not immediately obvious from the depiction of shipments in Figures 1 through 4, but these graphs do tell a positive story.

For all RVs, for towables, for motorhomes and for van conversions, March shipments, as reported by RVIA and adjusted for normal seasonal patterns, were below their three-year ranges for the month. March's total shipment figures fell below the worst performance of every month in the past three years—*except* for February 1990.

And that is the happy ending: The downward slide of the past few months was arrested in March. Total shipments, for the first time since last November, gave evidence of a slight upward tendency.

Good News for Motorized

The only sector that did not show a turnaround in March was towables. Figure 2 indicates that towables were declining in March.

At 11,030 units, shipments of towables would have been respectable if that performance had been turned in for any month from April through October in the period 1987-1989. But as a March tally, towable shipments did not measure up to even the weakest March of that period, even though towables fell less than 4% below the bottom of the monthly range in Figure 2.

Motorhomes did better. With 5,080 units shipped in March, motorhomes were at their highest point since last July. Although still below their three-year range and still 11% behind March 1989, these units may have turned the corner.

In March, van conversions also had their best month for the first quarter of 1990. Although 11% behind the same month a year ago, van-conversion shipments came in 2% ahead of February 1990 levels.

Bucking the Trend

Clearly, March shipments switched directions compared with the first two months of 1990: In March, towables were headed down, while motorhomes and van conversions were recovering. Yet, for the year-to-date, towables still emerged with the best record. Figure 5 indicates this by showing how towables gained 3.14 points in market share, while motorhomes lost 1.03 points, and van conversions lost 2.11 points.

The way in which March bucked the tendency of the first quarter is seen even more clearly in Figure 6. Motorhomes as a group were up 5.7% from the previous month but still ran 14.5% behind the first quarter of 1989. Van conversions were up 2.2% for the month but were down 13% for the year-to-date.

PERCENT MARKET SHARE BY TYPE OF UNIT
(Year-to-date, adjusted for seasonal variation)

	1990	1989
TOTAL RVs	100.00	100.00
Travel Trailers:	25.54	23.09
Conventional	14.87	13.47
Park Models	1.93	1.95
Fifth-wheels	8.75	7.68
Folding Camping Trailers	9.56	9.04
Truck Campers	2.67	2.51
TOTAL TOWABLES	37.78	34.64
Motorhomes:		
Class A	8.99	9.60
Class B Van Campers	1.61	1.25
Class C:	5.45	6.22
Minis	4.11	5.24
Low Profiles	0.24	0.40
Micro-minis	1.10	0.59
TOTAL MOTORHOMES	21.50	23.30
Multiuse Van Conversions	46.17	48.28

Percentages may not add to total because of rounding.

Figure 5

Year-to-date Van Shortfall

As a result, for the year-to-date, there was a 9% shortfall in total shipments compared with the first three months of 1989, which was largely due to the deficiency in the van-conversion market. Although conversions accounted for 46% of the total market, they equaled nearly 70% of the difference between the shipments of the first quarter of 1989 and those for the same period of 1990. If van conversions were deleted from the industry total as of March, shipments would have been off by only 5.3% from last year, rather than 9%.

Indeed, looking at the market in more detail, improved performances were delivered by conventional travel trailers, park models and folding camping trailers in March. Also showing signs of better times were all three classes of motorhomes and van conversions. The evidence of those turnarounds is seen in Figure 6, where the monthly percent change for March is a stronger value than the percent change for the year-to-date for each of the above RV types.

Only truck campers and two Class C types (micro-minis and low-profiles) had lower marginal (meaning monthly) percent changes than the average percent change for the year-to-date.

In the words of the business reporters who populate our nightly television screens, the "tick was positive"—meaning that the latest observations from the marketplace were favorable. Δ

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RV SHIPMENTS BY TYPE OF UNIT
(Adjusted for seasonal variation)

Type of Units	Mar '90	Change From Feb '90 Number	%	Year-to-Date 1990	1989	Change Number	%
TOTAL RVs	30,580	440	1.4	92,920	102,080	- 9,160	- 9.0
Travel Trailers:	7,770	60	0.7	23,730	23,570	160	0.7
Conventional	4,470	50	1.1	13,810	13,750	70	0.5
Park Models	650	50	9.3	1,790	1,990	- 190	- 9.8
Fifth-wheels	2,650	- 50	- 1.7	8,130	7,840	290	3.7
Folding Camping Trailers	2,520	- 90	- 2.5	8,890	9,230	- 340	- 3.7
Truck Campers	740	- 130	- 14.8	2,480	2,560	- 80	- 3.1
TOTAL TOWABLES	11,030	- 160	- 1.3	35,100	35,360	- 250	- 0.7
Motorhomes:							
Class A	2,890	220	7.8	8,350	9,800	- 1,450	- 14.8
Class B Van Campers	580	150	30.9	1,500	1,280	220	17.1
Class C:	1,610	- 80	- 4.6	5,060	6,350	- 1,290	- 20.3
-Minis	1,290	0	0.0	3,820	5,350	- 1,520	- 28.5
-Low Profiles	0	- 80	- 100.0	220	410	- 190	- 46.0
-Micro-minis	320	- 10	- 2.6	1,020	600	420	70.2
TOTAL MOTORHOMES	5,080	290	5.7	14,910	17,430	- 2,520	- 14.5
Multiuse Van Conversions	14,470	320	2.2	42,900	49,280	- 6,380	- 13.0

Note: Data rounded to nearest 10 units.

Figure 6